



# Claim for Excelsior Jobs Program Tax Credit

Tax Law - Sections 31 and 606(qq)

# IT-607

Calendar-year filers, mark an X in the box:

Other filers enter tax period:

beginning  and ending

Submit this form with Form IT-201, IT-203, IT-204, or IT-205.

You must also submit a copy of the certificate(s) of tax credit issued by Empire State Development (ESD).

Name(s) as shown on return	Identifying number as shown on return
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A Year of eligibility (enter a number from 1 to 10; see instructions)..... A

## Schedule A – Credit components (see instructions)

### Part 1 – Excelsior jobs tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	1	Enter your excelsior jobs tax credit component .....	1	.00
Partner	2	Enter your share of the excelsior jobs tax credit component from your partnership(s) .....	2	.00
S corporation shareholder	3	Enter your share of the excelsior jobs tax credit component from your S corporation(s) .....	3	.00
Beneficiary	4	Enter your share of the excelsior jobs tax credit component from the estate(s) or trust(s) .....	4	.00
	5	Total excelsior jobs tax credit component (add lines 1 through 4; see instructions) .....	5	.00

### Part 2 – Excelsior investment tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	6	Enter your excelsior investment tax credit component .....	6	.00
Partner	7	Enter your share of the excelsior investment tax credit component from your partnership(s) .....	7	.00
S corporation shareholder	8	Enter your share of the excelsior investment tax credit component from your S corporation(s) .....	8	.00
Beneficiary	9	Enter your share of the excelsior investment tax credit component from the estate(s) or trust(s) .....	9	.00
	10	Total excelsior investment tax credit component (add lines 6 through 9; see instructions) .....	10	.00

### Part 3 – Excelsior research and development tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	11	Enter your excelsior research and development tax credit component .....	11	.00
Partner	12	Enter your share of the excelsior research and development tax credit component from your partnership(s) .....	12	.00
S corporation shareholder	13	Enter your share of the excelsior research and development tax credit component from your S corporation(s) .....	13	.00
Beneficiary	14	Enter your share of the excelsior research and development tax credit component from the estate(s) or trust(s) .....	14	.00
	15	Total excelsior research and development tax credit component (add lines 11 through 14; see instructions) .....	15	.00



**Part 4 – Excelsior real property tax credit component** (see instructions)

<b>Individual (including sole proprietor), partnership, fiduciary</b>	<b>16</b>	Enter your excelsior real property tax credit component ...	<b>16</b>	.00
<b>Partner</b>	<b>17</b>	Enter your share of the excelsior real property tax credit component from your partnership(s) .....	<b>17</b>	.00
<b>S corporation shareholder</b>	<b>18</b>	Enter your share of the excelsior real property tax credit component from your S corporation(s) .....	<b>18</b>	.00
<b>Beneficiary</b>	<b>19</b>	Enter your share of the excelsior real property tax credit component from the estate(s) or trust(s) .....	<b>19</b>	.00
	<b>20</b>	<b>Total excelsior real property tax credit component</b> (add lines 16 through 19; see instructions) .....	<b>20</b>	.00

**21** Excelsior jobs program tax credit (add lines 5, 10, 15, and 20) ..... **21** .00

**Fiduciaries:** Complete Schedule C.

**Individuals (including sole proprietors), partners, S corporation shareholders, and beneficiaries:** Enter the line 21 amount on line 22.

**Schedule B – Partnership, S corporation, estate, and trust information** (see instructions)

If you were a partner in a partnership, a shareholder of a New York S corporation, or a beneficiary of an estate or trust and received a share of the excelsior jobs program tax credit from that entity, complete the following information for each partnership, New York S corporation, estate, or trust. For *Type*, enter **P** for partnership, **S** for S corporation, or **ET** for estate or trust.

Name	Type	Employer ID number

**Schedule C – Beneficiary’s and fiduciary’s share of credit components and recapture of credit** (see instr.)

<b>A</b> Beneficiary’s name (same as on Form IT-205, Schedule C)	<b>B</b> Identifying number	<b>C</b> Share of excelsior jobs tax credit component	<b>D</b> Share of excelsior investment tax credit component	<b>E</b> Share of excelsior research and development tax credit component	<b>F</b> Share of excelsior real property tax credit component	<b>G</b> Share of recapture of credit
Total		.00	.00	.00	.00	.00
		.00	.00	.00	.00	.00
		.00	.00	.00	.00	.00
Fiduciary		.00	.00	.00	.00	.00

**Schedule D – Computation of credit** (see instructions)

<b>Individuals (including sole proprietors), partners, S corporation shareholders, beneficiaries</b>	<b>22</b>	Enter the amount from line 21 .....	<b>22</b>	.00
<b>Fiduciaries</b>	<b>23</b>	Enter the amount from Schedule C, <i>Fiduciary</i> line, column C	<b>23</b>	.00
	<b>24</b>	Enter the amount from Schedule C, <i>Fiduciary</i> line, column D	<b>24</b>	.00
	<b>25</b>	Enter the amount from Schedule C, <i>Fiduciary</i> line, column E	<b>25</b>	.00
	<b>26</b>	Enter the amount from Schedule C, <i>Fiduciary</i> line, column F	<b>26</b>	.00
	<b>27</b>	<b>Total excelsior jobs program tax credit</b> (add lines 22 through 26; see instructions) .....	<b>27</b>	.00

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**Schedule E – Summary of recapture of credit** *(see instructions)*

<b>28</b> Individual's and partnership's recapture of credit .....	<b>28</b>	.00
<b>29</b> Beneficiary's share of recapture of credit <i>(see instructions)</i> .....	<b>29</b>	.00
<b>30</b> Partner's share of recapture of credit <i>(see instructions)</i> .....	<b>30</b>	.00
<b>31</b> S corporation shareholder's share of recapture of credit <i>(see instructions)</i> .....	<b>31</b>	.00
<b>32</b> Fiduciaries: enter your share of amount from Schedule C, <i>Fiduciary</i> line, column G .....	<b>32</b>	.00
<b>33</b> Total <i>(add lines 28 through 32)</i> .....	<b>33</b>	.00

**Individuals (including sole proprietors), partners, S corporation shareholders, and beneficiaries:** Enter the line 33 amount and code **607** on Form IT-201-ATT, line 20, or Form IT-203-ATT, line 19.

**Fiduciaries:** Include the line 33 amount on Form IT-205, line 12.

**Partnerships:** Enter the line 33 amount and code **607** on Form IT-204, line 148.

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